



MILWAUKEE COUNTY
Behavioral
Health
Division

myAvatar™

Tips and Tricks



Using Document Routed myAvatar Forms- Any Avatar form that has draft/final designation can be routed to another user for review and approval, or as a notification.

Part 2- Approving Documents

- A. When a document is routed for approval, Approvers receive a To Do item that displays in the *My To Do's* Widget. If there is only 1 document to approve, click on the Approve Document link in the Action column to open the TIFF image for review.

The screenshot shows the 'My To Do's' widget with a table of tasks. The first task is for 'Tom Petty' with the action 'Approve Document' highlighted by a red box. A tooltip for 'Approve Document' is visible, stating 'Click to open.'.

Client	Action	Form	Sent	Comments	Note-to-Self
Tom Petty	Approve Document	History and Physical Exam	04/12/2018	Review Document	

Review the entire document by clicking the arrow icons and either click Accept or Reject as needed.

To reject the document:

1. Click Reject
2. Enter the reason for rejecting
3. Click OK

The screenshot shows the 'Approve Document' dialog box. It displays document details and a list of actions. The 'Reject' button is highlighted with a red box.

Approve Document

1 of 3

Document Details:

- Date Created: 04/12/2018 at 11:16 AM CDT
- Form Name: History and Physical Exam
- Client's Name: PETTY, TOM (000100002)
- Client's DOB: 04/30/1969
- Milwaukee County Behavioral Health Div.
- 9455 W Watertown Plank Rd.
- Milwaukee, WI 53226-3559

History and Physical Exam

Assessment Date: 04/12/2018

Patient is a poor historian: Yes

Reason for Admission: Aggression

Chief Complaint: No physical complaint

Surgical History Comment: Gall bladder

Discussed Cessation: Patient unwilling/unable to discuss cessation

Constitutional: Negative

Eyes: Positive

If positive: glasses

HEENT: Negative

Resp: Negative

GI: Negative

Buttons: Accept, Reject

The screenshot shows the 'myAvatar 2018 - Comments for Reject' dialog box. It prompts the user to enter a reason for rejecting the document. The 'Reason for rejecting document' field is highlighted with a red box. The 'OK' button is also highlighted with a red box.

myAvatar 2018 - Comments for Reject

Reason for rejecting document

Buttons: OK, Cancel

Date Created: 04/12/2018 at 11:16 AM CDT
Form Name: History and Physical Exam
Client's Name: KETTY, TOM (000100002)
Client's DOB: 04/20/1969

Milwaukee County Behavioral Health Div.
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Milwaukee, WI 53226-3559

while at intake. Seen for medical, denied issues at this time.

Medical-
Seizure when he was 40 unconfirmed ? - continue to monitor

Psych- continue TX with
he of AGDA and psychosocial

Assessment and Plan choice
admission

Substance Abuse reviewed?

In the past 30 days, has
cigars?: Patient has not

Time: 10:58 AM

Is this History and Physical Exam complete?: Yes

Draft/Final: Final

Signed: NURSE MORRIS RN on 04/12/2018 at 11:16 AM CDT Author

Signed: DOCTOR MORRIS MD on 04/12/2018 at 03:16 PM CDT Attending Practitioner

1

2

3

Accept

Reject

To Accept the document:

1. Click Accept
2. Type your password
3. Click OK

B. If there are 2 or more documents to approve, click on the Sign tab on the *My To Do's* Widget and click on the Undock icon. Maximize the widget to review all documents.

My To Do's All (2) New (2) Sign (2)

Filter All

Client	Action	Form	Sent	Comments	Note-to-Self
Tom Petty	Approve Document	History and Physic	04/12/2018	Review Docu...	
Abe Lincoln	Approve Document	History and Physic	04/12/2018	Review Docu...	

My To Do's All (2) New (2) Sign (2)

Search Documents

Staff

Filter by Form

My Documents

Accept

Reject

Chart

Accepted Documents

Client

Document

Sign All

Remove

Undock

The Sign tab allows the Approver to review documents in the widget and **Accept** or **Reject** the document. All accepted documents are moved to the **Accepted Documents** frame of the widget. Once all documents are either accepted or rejected, the final approver can **Sign All** (enter their password once) for all **Accepted Documents**.

My To Do's All (2) New (2) Sign (2)

Search Documents

Staff

Filter by Form

My Documents

Accept

Reject

Chart

Accepted Documents

Client

Document

1

2

3

Accept

Reject

Chart

Sign All

Remove

Undock

1 of 3

Date Created: 04/12/2018 at 11:03 AM CDT
Form Name: History and Physical Exam
Client's Name: SUSANNE MORRIS, SUSAN (000100002)
Client's DOB: 04/20/1969

Milwaukee County Behavioral Health Div.
9455 W Watertown Plank Rd.
Milwaukee, WI 53226-3559

History and Physical Exam

Assessment Date: 04/12/2018

Referral Refused: No

History and Physical completed within 30 days: No

History Unobtainable from patient due to: Medical status altered

Patient is a poor historian: Yes

History obtained from: Other

Reason for Admission: Psychosis

Medically Cleared: Yes

Secrets withheld: No

Surgical History: None

Discharged cessation + patient unwilling/unable to discontinue cessation

Sexually Active: Yes

Constitutional: Negative

Spex: Negative

HEENT: Positive

TI positive + headache

Pump: Positive

TI positive: cough

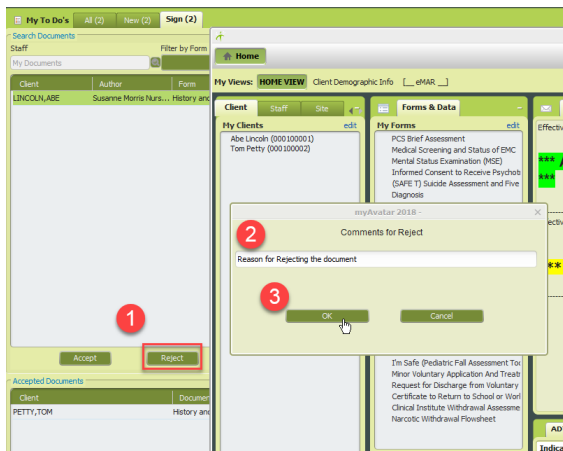
CV: Negative

GI: Negative

Review each document:

1. Select the client
2. Review the entire document by clicking the arrow icon
3. Click Accept or Reject as necessary

The *To Do* item is automatically removed from the *My To Do's* list.



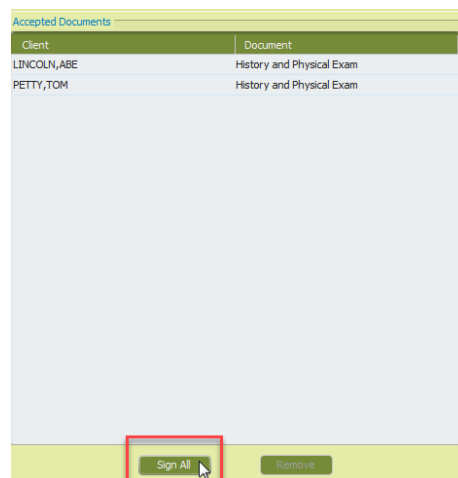
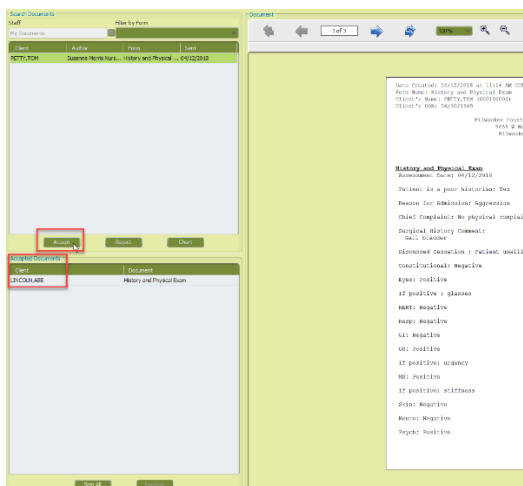
To reject the document, with the client selected;

1. Click Reject
2. Enter the reason for rejecting
3. Click OK.

The document is routed back to the author who receives a *To Do* item with comments indicating the reason for rejecting the document.

To accept the document, select the client and click Accept. The document moves down to the Accepted Documents frame of the widget.

Sign all documents. Click Sign All, enter your password and click OK.



If a document is accepted, and the reviewer decides not to sign after all, select the client and click Remove. The document is removed from the Accepted Documents panel and placed back in the top portion of the widget to review and/or Reject as needed.

